

CALIFORNIA

FORM 9000/9000R & INSTRUCTIONS



2003 HOMEOWNER AND RENTER ASSISTANCE CLAIM BOOKLET

You may qualify for Homeowner or Renter Assistance even though you are not required to file a state income tax return.

Members of the Franchise Tax Board

Steve Westly, Chair
Carole Migden, Member
Steve Peace, Member

Are You Eligible?

File a claim if:

You were **one** of the following on December 31, 2002:

- 62 years of age or older;
- Blind; or
- Disabled; **and**

You meet **all** of the following requirements:

- You paid \$50 or more rent per month in 2002, **or** if you owned and lived in your own home on December 31, 2002;
- Your total household income for 2002 was \$37,676 or less; **and**
- You are a United States citizen, a designated alien, or qualified alien when you filed your claim.

Note: Use this booklet to file your 2003 Homeowner or Renter Assistance Claim. The qualifying period for this booklet is calendar year 2002; therefore, you will be providing information relating to the 2002 calendar year. Homeowners will also be providing information relating to their 2002/2003 property tax bill.

Free Help

Free assistance is available between July 1 and October 15.

Franchise Tax Board field offices will not be able to fill out Homeowner or Renter Assistance claim forms this year due to budget constraints. Volunteers are available to provide help. Call (800) 338-0505 or visit our Website at www.ftb.ca.gov to get the address of a Homeowner or Renter Assistance Volunteer site near you.

If you need help completing the claim form in this booklet, please see page 2 and page 28.

Asistencia Gratuita en Español:

Asistencia gratuita bilingüe en Español se describe en la pagina 28 de este folleto.

PRSRST STD
U.S. Postage Paid
Sacramento, CA
Permit No. 312

STATE OF CALIFORNIA
FRANCHISE TAX BOARD



Homeowner and Renter Assistance

What's In This Booklet

	Page
What's New	3
Commonly Asked Questions	3
Step-by-Step Instructions for Completing the Claim Form	6
Proof of Age	7
Proof of Blindness or Disability	8
Homeowner Property Information	8
Rental Information	10
Income of Household Members	10
Property Tax Paid and Homeowner Assistance Claimed	12
Renter Assistance Claimed	13
Review and Mail Your Claim Form	13
Privacy Act Notice	14
Eligibility Code Chart for Noncitizens	15
Affidavit of Doctor, for proof of temporary blindness or disability	16
Form FTB 9000, Homeowner Assistance Claim	17
Form FTB 9000R, Renter Assistance Claim	23
Toll-Free Assistance	28

Free Assistance

Franchise Tax Board field office staff will not fill out Homeowner or Renter Assistance claim forms this year due to budget constraints. However, volunteers are available to provide help.

A statewide volunteer assistance program provides free assistance between July 1 and October 15, 2003 for completing your claim form. Call the Franchise Tax Board at (800) 338-0505, your local Senior Citizens Information and Referral Service, or your state legislator's office for the Homeowner and Renter Assistance (HRA) volunteer site nearest you. You may also view the Franchise Tax Board Internet Website at: **www.ftb.ca.gov**

If you need information to complete your claim form or to find out about your assistance check, call (800) 338-0505.

Letters

If you need to write to us, send your letter to:

FRANCHISE TAX BOARD
PO BOX 942886
SACRAMENTO CA 94286-0940

Include your social security number and your daytime and evening telephone numbers in your letter. We will respond to your letter within 15 weeks. In some cases, we may need to call you for additional information.

Form

You can download, view, and print claim forms and publications. Go to our Website at: **www.ftb.ca.gov**

You may also order forms and publications by phone. See "Where To Get Claim Forms" on page 28 for instructions.

What's New

Homeowner and Renter Assistance Claims Combined into one Booklet

We are combining the Homeowner and Renter Assistance Claims into one booklet starting with the 2003 claim year. Homeowners will still complete the form FTB 9000, and renters will still complete the form FTB 9000R. Most of the instructions in this booklet apply to both homeowners and renters, however there are specific instructions that apply only to homeowners or only to renters. If the instructions only apply to one or the other, the instructions clearly explain which claim they apply to. **Only one claim can be filed per household per year.**

Patients in Skilled Nursing Facilities and Intermediate Care Facilities Do Not Qualify for Renter Assistance

Patients in Skilled Nursing and Intermediate Care Facilities do not qualify for Renters Assistance. In order to be eligible for Renter Assistance, the claimant must be the "renter" of a "rented residence." Patients in Skilled Nursing and Intermediate Care Facilities do not pay rent for the right to occupy a residence, but rather pay a fee for the medical services provided by the facility. Therefore, these individuals do not satisfy the eligibility requirements for Renters Assistance.


Total Household Income Limits Increase

The maximum total household income you could have had in 2002 and still be eligible to file for claim year 2003 is \$37,676. For details, see "Who is Eligible for Homeowner or Renter Assistance" below.

Commonly Asked Questions

Where Do I Call For Help? (800) 338-0505

Information about the Homeowner and Renter Assistance Program is available 24 hours a day, 7 days a week by calling our Toll-Free Phone Service at (800) 338-0505. Refer to the back cover of this booklet for the list of codes for commonly asked questions. Select Homeowner and Renter Assistance, then General Information, and enter the three-digit code when instructed. Have a pencil and paper ready to take notes.

In addition, you will see a phone symbol  in the margin next to some paragraphs in this instruction booklet. The number below the phone symbol is the code for recorded information on that topic.

What is Homeowner Assistance and What is the Maximum Amount of Assistance Allowed?



800

Homeowner assistance is a once-a-year payment from the State of California based on part of the property taxes assessed and paid on your home. Eligible homeowners may receive up to 139% of the property taxes paid in 2002 (see page 21). The maximum assistance payment allowed is \$472.60

What is Renter Assistance and What is the Maximum Amount of Assistance Allowed?



801

Renter assistance is a once-a-year payment to qualified individuals from the State of California based on part of the property taxes that you pay indirectly when you pay rent. The maximum renter assistance payment allowed is \$347.50.

Note: Renter assistance is different from the nonrefundable renter's credit claimed on your state income tax return.

Who is Eligible for Homeowner or Renter Assistance?



803, 804

You may be eligible to file a 2003 Homeowner or Renter Assistance Claim form if you were any of the following on December 31, 2002:



TO QUALIFY YOU MUST BE	62 years of age or older; (See STEP B, line 3a)	or , Blind; (See STEP B, line 3b)	or , Disabled; (See STEP B, line 3c)
	You must also meet all of the following:		
HOMEOWNER	Owned and lived in your home in California on December 31, 2002. A home may include a condominium, “own your own” apartment, or a mobile home taxed as property; or		
RENTER (See STEP C)	You must have lived in a qualified rented residence in California, subject to property tax and paid \$50 or more per month for rent during 2002; and		
INCOME (See STEP D)	Had total household income of \$37,676 or less in 2002: and	Gross household income of \$68,502 or less in 2002. Gross household income plus all non-cash business expenses such as depreciation, amortization and depletion; and	
CITIZENSHIP	You must be a U.S. citizen or a designated alien, including a qualified alien, when you file the claim. For more information about alien status see page 15.		
IF MARRIED	Only one claim can be filed per household per year. Married couples living in the same residence can only file one claim.		

Note to Homeowners: You may file only one claim per household each year. Only one owner-claimant is entitled to payment per year. When two or more individuals of a household meet the qualifications, they should decide who will file the claim.

Note to Renters: A married couple residing in the same rented residence is considered one renter and may file only one claim. If you live in a rented residence with other qualified renters, each renter may file a separate claim.

If you are Not a U.S. Citizen

The federal Personal Responsibility and Work Opportunity Reconciliation Act of 1996 (the Act) requires that payments for homeowner and renter assistance claims be distributed only to United States citizens and certain designated aliens, including qualified aliens. To apply for these benefits, you must provide a declaration stating your citizenship or alien status. Completing form FTB 9000 or FTB 9000R, line 1 and line 2 and signing the form when you get to Step H provide the required declaration of your citizenship or alien status.

The Franchise Tax Board may request additional documentation or evidence to substantiate your declared status. The Act authorizes the Franchise Tax Board to compare information with the Bureau of Citizenship and Immigration Services (BCIS) to verify the immigration status you declare. Applicable regulations also provide that information concerning aliens who cannot prove their declared alien status, after being provided an opportunity to do so, shall be reported to the BCIS.

What is a Qualified Rented Residence?

You or your landlord must pay general property tax or amounts in lieu of property tax for a property to be considered a qualified rented residence.

If property taxes or amounts in lieu of property taxes are not paid for your rented residence, you may not file for renter assistance. If there are any questions regarding the tax-exempt status of your property, ask your landlord.

A qualified rented residence also must be:

- Your principal place of residence; and
- Located in California.

Various types of rented residences may qualify for renter assistance. Some of the most common types of residences are:

- Single family dwellings;
- Apartments;
- Hotel rooms;
- Mobile homes;
- Boarding houses;
- Duplexes;
- Flats; and
- Floating homes.

If you paid a vehicle-type tax on your mobile home to the Department of Housing and Community Development, you may file either as a homeowner or as a renter, but not both.

Occupying a medical facility, as a patient does not make it your rented residence. Such facilities are licensed medical institutions that provide medical care through the specialized staff required at those facilities. The patient occupies the space that is appropriate for their care and the fees paid are for that care, not for the right to a particular residential space. These facilities include, but are not limited to skilled nursing facilities, intermediate care facilities, and hospitals. These are not rented residences and do not qualify for renter assistance.

When Should You File Your 2003 Claim?

You should file your claim between July 1, 2003, and October 15, 2003 if possible.

What If You Do Not File Your 2003 Claim on or Before October 15, 2003?

You can file a 2003 claim until June 30, 2004. However, free volunteer assistance is not available after October 15, 2003. In addition, claim processing timeframes can be considerably longer after October 15, due to the fact that income tax processing takes priority over HRA claims during the tax filing season.



808

Can I File an Assistance Claim for Past Years?

You had until June 30, 2003 to file a claim for 2002. All other prior claim years that are filed will be denied unless you were medically incapacitated. If a medical incapacity prevented you from filing your timely claim, you must file the claim by the earliest of the following dates, and attach proof of medically certified incapacity:

- Within six months after your medical incapacity ends; or
- Within three years of the end of the fiscal year for which you wish to claim the assistance. For example, for claim year 2003, you will need to file by June 30, 2006, or within six months after your incapacity ends, whichever date is earlier. **However, do not use the 2003 claim form to file claims for prior years.**

There are **no** other exceptions that would allow you to file a claim for past years.



807

When Will Homeowner or Renter Assistance Checks be Mailed?

Most homeowner or renter assistance checks will be mailed within 15 weeks from the date you file your claim, if you file by October 15, 2003 and the required documents are attached to your claim and your claim form is complete. See page 13 for a list of the required documents.

Please wait 15 weeks from the date you filed your claim before you call us about your assistance check. It may take up to 15 weeks to process your claim. If you call before we have processed your claim, we will not have information about your check.

If your claim form is not complete, we may call or write for additional information.

Will passage of the 2003 state budget affect my payment?

The HRA program may be impacted by provisions of the 2003 state budget. If passage of the budget is delayed and the Governor does not sign the budget until after July 1, 2003, payments may be delayed for several weeks. All HRA claim processing estimates provided in these instructions are from the date that the budget is signed into law.

Death of Claimant

If the date of death is on or before January 1, 2003:

No person may file a claim on behalf of a person who died on or before January 1, 2003.

If the date of death is on or after January 2, 2003:

Only the surviving spouse of an eligible claimant who died on or after January 2, 2003 and did not file a claim may file a claim on behalf of the deceased spouse. However, if you are eligible to file your own claim, you should file your own claim instead of filing on behalf of your deceased spouse.

If the eligible claimant died after the claim was timely filed, any assistance attributable to such a deceased claimant may be paid to the surviving spouse, and if no surviving spouse, to any other household member who is a **qualified claimant**.

Before You Begin

Make sure you have the 2003, Homeowner or Renter Assistance Claim, form FTB 9000 (homeowners) or FTB 9000R (renters).

Gather **all** of your 2002 income records. Homeowners will also need a copy of their 2002/2003 property tax bill.

Step-by-Step Instructions

We provide step-by-step instructions to help you complete form FTB 9000 or FTB 9000R. Fill in only those lines that apply to your situation. If you need information or forms that are not included in this booklet, see the back cover.

Step-by-Step Instructions for Completing the Claim Forms

2003 forms FTB 9000 or FTB 9000R, Homeowner or Renter Assistance Claims are on pages 17 and 23 of this booklet.

STEP A Name, Address, and Social Security Number

If your booklet has a label on the front:

If the information is correct, attach the label to your completed claim. If the information is incorrect, cross out any errors and print the correct information. Place it on the name and address area in Step A of form FTB 9000 or FTB 9000R.

If your booklet does not have a label on the front:

Print in ink or type your full name and mailing address in the spaces provided in Step A at the top of form FTB 9000 or FTB 9000R.

Private Mailbox Numbers

If you lease a private mailbox (PMB) from a private business rather than a PO Box from the United States Postal Service, include the box number in the field labeled "PMB no" in the address area.

Social Security Number

Enter your social security number in the space provided. If you are married, you must enter your spouse's social security number in the other space provided. However, only one claim may be filed per married couple living in the same household.

STEP B Filing Status

Line 1 – Are you a United States citizen?

Yes. Check "Yes" on line 1, skip line 2 and go to line 3.

No. Check "No" on line 1 then go to line 2.

Line 2 – Benefit Eligibility for Noncitizens

Use the chart on page 15 to find the benefit eligibility code that matches your alien status. Then enter your alien status code on line 2a, alien registration number on line 2b, and date of entry to the United States on line 2c.

If you do not provide and complete the information requested on lines 2a, 2b, and 2c, or if your alien status is not included in the Eligibility Code Chart for Noncitizens on page 15, you cannot receive homeowner or renter assistance benefits.

Line 3a – Check the appropriate box on the form: 62 or Older

If you were 62 or older on December 31, 2002, regardless of blindness or disability, check box A.

Note: If you turned 62 on January 1, 2003, you are considered to be 62 on December 31, 2002. If you filed a claim form last year as blind or disabled and turned 62 during 2002, you must file as 62 or older by checking box A then go to line 4.



810

Proof of Age

If you are at least 62 years old, and received Supplemental Security Income (SSI), you do not need to send a proof of age document with your claim form. Your signature in Step H allows the Franchise Tax Board to verify your age with the Department of Health Services.

If you do not receive SSI, you must send a proof of age document for the first year you file as 62 years old or older. The proof of age document will become a permanent part of your record.

Attach a copy (do not send original documents) of **one** of the following:

- Birth certificate;
- Medi-Cal Benefits Identification Card (BIC);
- Hospital birth record;
- Church baptismal record; **or**
- Social security award letter that states your date of birth.

If you do not have any of the above documents, you should send a **copy** of any document that proves that you are 62 years old. Explain how the document proves your age.

Do not send your original Medi-Cal Benefits Identification Card as proof of age.

We cannot accept the following documents as proof of age:

- A copy of a California driver's license or identification card; or
- A Medicare card issued after June 30, 1973.

Line 3b – Under 62 and Blind

If you are blind but less than 62 years old, check box B then go to line 4.

You are considered blind if you have a statement from a doctor that says you have either:

- Central vision acuity (sharpness of vision) of no more than 20/200 with correction; or
- Tunnel vision, which is a limited visual field of no more than 20 degrees.

Line 3c – Under 62 and Disabled

If you are disabled but less than 62 years old, check box C. Then go to line 4.

You are considered disabled if you are unable to engage in any substantial gainful activity because of a physical or mental impairment that is expected to last for a continuous period of 12 months or longer. Further, you are considered to be disabled only if the physical or mental impairment is so severe that you are not only unable to do your previous type of work, but also cannot do **any** kind of substantial gainful work considering age, education, and work experience.

Note to Renters: A disabled minor child who receives SSI may qualify for Renter Assistance provided that the child's parent or guardian can supply all of the following:

- A copy of the SSI letter; or
- A statement from a physician, made under penalty of perjury, verifying that the child's disability meets the condition of impairment defined in Section 12050 of the Welfare and Institution Code; and
- A copy of the rental contract between the landlord and the claimant's parents or guardians; and
- Proof that claimant's parents or guardians were unable to make payments under the contract from their own resources, and use of the rental housing was necessary for the claimant's support; and
- Proof that payments for the rental housing are traceable directly to claimant's own separate assets.

Note: Living in a foster home does not qualify the child for HRA purposes.



Proof of Blindness or Disability

- Proof of blindness or **permanent** disability is required only the first year you file a homeowner or renter assistance claim. You will not need to send proof again as long as your condition remains the same.
- Proof of temporary disability is required each year that you file a homeowner or renter assistance claim.

Please send a copy of one of the following documents to certify you were disabled as of December 31, 2002:

- A copy of your Medicare Card,
- A copy of your Social Security Award Letter notifying you that you qualified for benefits as a disabled person in 2002,
- A copy of your Supplemental Security payment decision that shows your 2002 payment amounts,
- A statement of disability and/or blindness signed by a physician on the physician's letterhead or utilize the affidavit provided in this booklet on page 16, Form FTB 2194-3. Submit the statement or affidavit, this statement or affidavit must include the dates and nature of the disability.

We cannot accept your Medi-Cal Benefits Identification Card as proof of blindness or disability.

Line 4 –Date of Birth

You must enter the month, day, and year of your birth on line 4.

Example: If you were born on May 21, 1938, you would enter 05/21/1938 on line 4.

STEP C Homeowner Property Information

If you are a Renter skip this and go to page 10

Line 5 – Own and Live in a Home

You must have owned **and** lived in your home in California on December 31, 2002. A home may include a floating home or houseboat, your own condominium, "own-your-own" apartment, or a mobile or manufactured home taxed as property. If you pay a vehicle-type tax on your mobile or manufactured home to the Department of Housing and Community Development, you may file a claim for **either** homeowner assistance or for renter assistance. You may not file claims for both.

Line 5a – Full Value

Enter the full value of your property on line 5a. The full value of your property is the value of your property as shown on your 2002/2003 property tax bill, less the

homeowner's or veteran's exemption. This may also be identified as full cash value or full market value.

Note: Homeowner assistance is granted **only** on the first \$34,000 of the full value as shown on your property tax bill. Assistance will not be allowed on that part of the full value (after homeowner's or veteran's exemption) of a residential dwelling that is more than \$34,000.

Line 6 – Personal Use

If your property was used entirely for your personal use in 2002, check "No" and go to line 7. If you use part of your property for rental and/or business purposes, check "Yes" and enter your best estimate of the percentage of your property devoted to your personal use on line 6a. The percentage of your property you use as your home may be figured by the number of rooms, square footage, or any similar measure. For example, if you have five rooms in your home, use three rooms for your personal use and rent the other two rooms, your percentage of personal use would be figured this way:

$$\frac{3 \text{ rooms personal use}}{5 \text{ rooms total}} = 60\% \text{ personal use}$$

If you check "Yes," you must complete line 12.

Line 7 – Names on Your Property Tax Bill

List the name(s) and relationship(s) of anyone, other than yourself, who is included on your property tax bill. Indicate whether they lived in your home in 2002 by checking "Yes" or "No."

Enter 100% as your percentage of ownership if the name(s) listed on your 2002/2003 property tax bill include only your spouse or any of the following persons related to you or to your spouse:

- Parents;
- Children or their spouses; or
- Grandchildren or their spouses.

If your interest in your property is a recorded life estate, you are entitled to assistance on the tax assessed on your property.

Note: Death or divorce ends the relationship of any individual above who is related to the claimant only by marriage.

Complete the following worksheet only if there are owners on your 2002/2003 property tax bill other than the relatives listed above and each owner has an equal percentage of ownership. If each owner does not have an equal percentage of ownership, do not complete the worksheet, go to line 7 of form FTB 9000 and enter your percentage of ownership.

1. Total number of owners listed on your 2002/2003 property tax bill . . . 1. _____
2. Number of owners, other than those listed above who did not live with you during the period January 1, 2002, through December 31, 2002 . . . 2. _____
3. Subtract line 2 from line 1 . . . 3. _____
4. Divide the amount on line 3 by the amount on line 1. This is your percentage of ownership of the home. Enter this percentage on form FTB 9000, line 7 . . . 4. _____

Rental Information, Renters form FTB 9000R

- Line 5 –** Enter the total number of months during 2002 that you lived in a qualified rented residence in California and paid \$50 or more per month for rent.
- Line 6 –** If the address where you lived during 2002 is different than the address you entered in Step A, or if the address in Step A is a post office box, enter your 2002 residence address.
- Line 7 – Landlord Information**
Enter the name, address, and telephone number of your landlord or the person to whom you paid rent during 2002. If you had more than one landlord, attach a list of your other landlords with their names, addresses, and telephone numbers and dates rented.

STEP D Income of Household Members – Homeowners and Renters

You must enter the total household income received by all household members for the entire 2002 calendar year. Total household income from all members includes your income, your spouse's income if you are married, and the income received by any other person who lived in your home (only enter the income that the other persons received while living in your home during the 2002 calendar year). However, do not include the income of minors, full time students (under the age of 24 years), or renters.

- Line 8 – Social Security/Railroad Retirement**
Enter the total **yearly** amount of social security (including the amount deducted for Medicare premiums) and railroad retirement received by any household member, regardless of its source or taxability.

- Line 9 – Interest, Dividends, and/or Gain (or Loss)**
Enter the combined total **yearly** amount of interest, dividends, and capital gain (or loss) received by any member of the household, regardless of source or taxability.
Combine the amount of income (or loss) from the sale of assets with total yearly interest and dividends. You may use California Schedule D, Capital Gain or Loss Adjustment, to figure California gain or loss (not the adjustment). The maximum deductible net loss from the sale of capital assets is \$3,000. Examples of capital assets are stocks and bonds.
You may use California Schedule D-1, Sales of Business Property, to figure net ordinary income or loss on the sale of business property.

- Line 10 – Pensions, Annuities and IRAs**
Enter the total **yearly** amount of pensions, annuities and IRAs received by any member of the household. Include disability retirement payments and IRA distributions, regardless of source or taxability.

- Line 11 – SSI/SSP, AB, and ATD**
Enter the total **yearly** amount of the following types of assistance received by you, your spouse, or any household member.
- SSI/SSP (Supplemental Security Income/State Supplemental Plan);
 - AB (Aid to the Blind); and
 - ATD (Aid to the Totally Disabled).

Note: These payments are often called "Gold Checks."

- Line 12 – Rental and Business Income (or Loss)**
Enter the amount of net rental income (or loss). Provide the income or loss from your federal Schedule E (Form 1040), Supplemental Income and Loss or California

Schedule CA (Form 540), California Adjustments. If you did not complete the federal Schedule E or California Schedule CA, provide the income or loss amount from any supporting document.

Enter the amount of net income (or loss) from your business. You may use the amounts from your federal Schedule C or C-EZ (Form 1040), Profit or Loss From Business, for business income (or loss), or federal Schedule F (Form 1040), Profit or Loss From Farming, for farm income (or loss).

If you checked "Yes" on line 6, you must complete line 12.

Line 13 – Other Income (Including Wages)

Enter the **total yearly** amount of other income received by you, your spouse, and the other members of your household during 2002. Some of the types of income that you must include on line 13 are:

- Wages;
- Alimony received;
- Life insurance proceeds to the extent they exceed the expenses incurred for the last illness and funeral of a deceased spouse or the claimant;
- Veteran's benefits;
- Unemployment insurance benefits;
- Worker's compensation for temporary disability (amounts for permanent disability must be entered on line 11);
- Amounts received from an employer or any government body for loss of wages due to sickness or accident (sick-leave payments);
- Military compensation (including nontaxable military compensation);
- Scholarships and fellowship grants;
- Nontaxable gain from the sale of a residence;
- California lottery winnings in excess of \$600 in 2002; 100% of other lottery winnings;
- Gifts and inheritances (including noncash items) in excess of \$300, except transfers between members of the same household;
- Amounts received from an estate or trust that were not included on any other line;
- Amounts contributed by or on behalf of the claimant to a tax sheltered retirement plan or deferred compensation plan;
- The amount of alternative minimum taxable income in excess of your regular taxable income, if you were required to pay alternative minimum tax on your 2002 California income tax return; and
- Public assistance and relief, other than as excluded below.

Types of income that you must **not** include on line 13 are:

- Temporary Assistance for Needy Families, formerly Aid to Families with Dependent Children (AFDC);
- Foster care payments;
- Federal heating rebates;
- Utility company refunds or assistance;
- Medicare or Medi-Cal reimbursements for medical expenses; and
- Homeowner or renter assistance payments.

Homeowner or Renter assistance will not be included as income or resources in determining the amount of public assistance payments to which you are entitled. Therefore, payments or assistance you or your spouse receive, such as food stamps, Temporary Assistance for Needy Families, SSI/SSP, or payment for homemaker/chore services will not be reduced as a result of filing this claim.

Line 14 – Subtotal

Add line 8 through line 13.

STEP E Adjustments to Income – Homeowners and Renters

Line 15 – Adjustments to Income

You may deduct the following from your income:

- **Individual Retirement Arrangement Deduction** – Deduct your deductible contribution to an Individual Retirement Account (IRA), Keogh (HR 10), Simplified Employee Plan (SEP), or Savings Incentive Match Plans for Employees (SIMPLE).
- **Archer Medical Savings Account (MSA) Deduction** – Deduct the amount you contributed to an MSA.
- **Moving Expenses** – Deduct allowable moving expenses that were not reimbursed by your employer.
- **Self-employment tax deduction** – Deduct one-half of your self-employment tax imposed for the taxable year.
- **Self-employed health insurance deduction** – Deduct the amount allowed for California personal income tax.
- **Forfeited interest penalty on early withdrawal of savings** – Deduct the penalty charged for premature withdrawal from a savings account.
- **Alimony paid** – Deduct court-ordered alimony payments.

Attach the appropriate form or a schedule explaining each adjustment to income.

You may **not** subtract these items from your household income:

- Mortgage payments;
- Utilities;
- Repairs;
- Taxes (other than self-employment tax);
- Fees;
- Medical bills; and
- Interest paid on loans (other than interest on qualified education loans).

STEP F Total Household Income – Homeowners and Renters

Line 16 – Total Household Income

Subtract line 15 from line 14. Enter the result on line 16. If the amount on line 16 is **more** than \$37,676, STOP. You do **not** qualify for homeowner or renter assistance.

STEP G Homeowner Property Tax Paid and Homeowner Assistance Claimed

If you are a Renter skip this and go to page 13

Line 17 – Property Tax for 2002/2003

Enter the total tax (after subtracting your homeowner's or veteran's exemption) from your 2002/2003 property tax bill. **Do not include payments for special or direct assessments, including improvement bonds or charges for services.** The maximum amount of property taxes claimed on your homeowner's claim cannot exceed one percent (1%) of the full value of the property as shown on your 2002/2003 property tax bill.

You **must** attach a copy of your **2002/2003** property tax bill, a tax status report, or a Cooperative Housing Property Tax Statement to your claim.

If you are a mobile or manufactured home owner, you **must** include a copy of the Registration card and Renewal Billing Notice issued by the Department of Housing and Community Development and/or property tax bill you received for your mobile or manufactured home.

Renter Assistance Claimed, form FTB 9000R

Line 17 – Renter Assistance Claimed

Line 18 – Homeowner or Renter Assistance Claimed

The amount of homeowner or renter assistance you will receive will be figured for you. You **do not** have to complete this line. If you wish to figure the amount of assistance, see “Worksheet to Figure the Amount of Homeowner or Renter Assistance” on pages 21 and 27.

Note: The law provides that no payment is permitted if the amount of allowable assistance is \$5 or less.

STEP H Signature, Date, and Telephone Number

Authorization

If you receive SSI, the Franchise Tax Board can verify with the Department of Health Services that you meet the age, disability, or blindness requirement. This helps us process your claim faster. In addition, other eligibility criteria may be verified with the Department of Health Services and other state or federal agencies.

Declaration

Your signature on form FTB 9000 or FTB 9000R, Step H, is also your declaration of your qualified alien or citizenship status.

Sign and Date Your Claim Form

You must sign and date your claim form in the space provided. You may sign by making a mark in front of a witness. The word “witness” and the witness’s signature **must** be entered after your mark. If you are filing on behalf of a deceased spouse, print “Surviving Spouse” after your signature. See instructions for Death of Claimant on page 6.

Preparer Tax Identification Number (PTIN)

Tax professionals have the option of providing their individual Social Security Number (SSN) or Preparer Tax Identification Number (PTIN) on claims they prepare. The alternative number can be used in lieu of an SSN beginning January 1, 2000. Preparers who want a PTIN must complete and submit federal Form W-7P, Application for Preparer Tax Identification Number, to the IRS.

Enter Your Telephone Number

Your telephone number is important. If the need arises, we can provide you with faster and more complete service if we can contact you by telephone rather than in writing.

Review and Mail Your Claim Form

Review Your Claim Form

Review your claim form to make sure it is complete and correct. Be sure to include any copies of documents that were requested in the instructions (see list below).

If the required documents are not attached to your claim form, your check will be delayed until the Franchise Tax Board receives and processes the missing documents. Attach copies of the following required documents that apply to your claim:

- Proof of age (required for the first year you file as 62 or older. See page 7 for additional information);
- Proof of blindness or permanent disability (required for the first year you file as blind or permanently disabled);
- Proof of temporary disability (required each year you file as disabled) and;

-
- If the claim is signed by someone acting as an Attorney in Fact, a copy of the Power of Attorney must be submitted with the claim;
 - **Homeowners:** If you lived in a mobile or manufactured home, a copy of the Registration Renewal Notice and Registration card and/or property tax bill you received for your mobile or manufactured home; and
 - **Homeowners:** Your property tax bill (except for Tenant-Stockholders).

Keep the following documents that apply to your claim for your records (do not send in copies unless you are specifically requested to do so).

- If you have rental income (or loss), business income (or loss), capital gains (or loss), or adjustments to income, a complete copy of your 2002 federal Form 1040 along with the supporting schedules;
- **Homeowners:** If you do not own your home but have a possessory interest, a copy of the document granting you a possessory interest;
- **Homeowners:** If your property is held in a trust, a copy of the Certification of Trust, or the date of execution of the trust instrument, the identity of the settlor(s), current acting trustee(s), whether it is a revocable trust, and the trust identification number.

Mail Your Claim Form

Mail your claim form and attached documents to:

FRANCHISE TAX BOARD
PO BOX 942886
SACRAMENTO CA 94286-0904

In most cases, homeowner and renter assistance checks will be mailed within 15 weeks from the date you filed your claim.

Privacy Act Notice

The Information Practices Act of 1977 and the Federal Privacy Act require that the following information be provided to individuals who are asked to supply information:

The official who is responsible for maintaining the information is the Director, Processing Services Bureau. Address your correspondence to:

DIRECTOR, PROCESSING SERVICES BUREAU
FRANCHISE TAX BOARD
PO BOX 942840
SACRAMENTO CALIFORNIA 94240-1040.

Telephone number:

- Within the United States (800) 338-0505
- Outside the United States (916) 845-6600

The Revenue and Taxation Code requires every person claiming benefits under the Homeowner and Renter Assistance Program to make a claim according to the forms and regulations prescribed by the Franchise Tax Board (Sections 20501 through 20646 and the Regulations pertaining thereto).

Individuals making claims or providing statements or other documents are required to include their social security numbers to ensure proper identification and to permit processing of the claims. (See also Section 205(c)(2) of the Federal Social Security Act as amended by Section 1211 of the Federal Tax Reform Act of 1976.)

The principal purposes for requesting information are to permit the department to properly respond to homeowner and renter assistance claims and other communications and to determine the validity of claims. Filing a claim for assistance is voluntary. However, if a claim is filed, the applicant must complete the form and provide all requested information for the claim to be considered. Assistance shall not be allowed based on incomplete or inaccurate claims.

As authorized by law, information furnished on the form may be transferred to the federal Immigration and Naturalization Service and to the following governmental agencies and officials of the State: Board of Control, Board of Equalization, Department of Finance, Office of the State Controller, Auditor General, and Legislative Analyst. An individual has a right of access to records containing his/her personal information that are maintained by the Franchise Tax Board.

Chart for Finding the Benefit Eligibility Code for Noncitizens

Are you a United States citizen?

Yes STOP. You **must** check the “Yes” box on line 1 of form FTB 9000 or FTB 9000R. You do not need to read this page.

No You **must** enter an eligibility code from the chart below on line 2a of form FTB 9000 or FTB 9000R. Follow the instructions below for determining your eligibility code.

General Information

If you are not a United States citizen, you may file a claim for homeowner or renter assistance only if you are one of the following when you file your claim:

- A qualified alien;
- A nonimmigrant alien under the Immigration and Nationality Act (INA); or
- An alien paroled into the United States under Section 212(d)(5) of the INA for less than one year.

These categories of aliens are described further by the Eligibility Code Chart for Noncitizens below.

Undocumented aliens and aliens not described below are not eligible to receive homeowner or renter assistance and should not complete a claim form.

Instructions

If you are **not** a United States citizen, find the category listed below that accurately describes your presence or admission to the United States. Transfer the alien status code letter for that category to form FTB 9000 or FTB 9000R, line 2a.

Note: If you have questions regarding your immigration status, contact your local Bureau of Citizenship and Immigration Services (BCIS) office.

Eligibility Code Chart for Noncitizens

If you are:	Use Alien Status Code:
<ul style="list-style-type: none">• An alien lawfully admitted for permanent residence under the INA;• An alien who (or whose child or child's parent) has been battered or subjected to extreme cruelty in the United States by a spouse or parent or by a spouse or parent's family member living in the same house; OR• The child of an alien who has been battered or subjected to extreme cruelty in the United States by a spouse or parent or by a spouse or parent's family member living in the same house.	B
An alien who is granted conditional entry under Section 203(a)(7) of the INA as in effect prior to April 1, 1980.	C
An alien whose deportation is being withheld under Section 243(h) of the INA (as in effect immediately prior to September 30, 1996) or Section 241(b)(3) of the INA (as amended by Section 305 (a) of Division C of Public Law 104-208).	D
An alien who is granted asylum under Section 208 of the INA.	E
A refugee admitted to the United States under Section 207 of the INA.	F
An alien paroled into the United States for one year or more under Section 212(d)(5) of the INA.	G
An alien who is a Cuban or Haitian entrant (as defined in Section 501(e) of the Refugee Education Assistance Act of 1980).	H
An alien paroled into the United States for less than one year under Section 212(d)(5) of the INA.	I
A nonimmigrant alien, as defined in Section 101(a)(15) of the INA, admitted under the INA (8 U.S.C. Section 1101...).	J

You do not qualify for homeowner or renter assistance if:

- Your alien status is not described above.
- You are an undocumented alien. Undocumented aliens do not qualify for most public benefits, including homeowner or renter assistance.

Affidavit of Doctor for Homeowner and Renter Assistance Program

Patient/Claimant: Fill in your name and social security number below, then ask your doctor to complete this affidavit of disability and/or blindness. Submit the affidavit when you file your claim. The affidavit must include the dates and nature of disability.

Patient's/Claimant's name: _____

Patient's/Claimant's social security number: _____

Doctor complete the following:

Doctor's name: _____

Doctor's business address: _____

Doctor's business telephone: (_____) _____

California medical license number _____

Dates and nature of patient's/claimant's disability: _____

The patient named above was under my care, and I completed the above information. In my professional opinion, on December 31, 2002, the patient was disabled to such extent that he/she was incapable of engaging in any substantial gainful activity (previous work or other work). I further declare that this patient's disability lasted or was expected to last for at least 12 consecutive months, including December 31, 2002.*

I declare this statement to be true and correct to the best of my knowledge and belief under penalty of perjury:

Doctor's Signature

Date

* For example, for purposes of homeowner and renter assistance, the 12-month consecutive period of disability can occur at any time between January 1, 2002 through December 30, 2003, so long as it includes December 31, 2002.

Homeowner Assistance Claim (for income received in 2002)

2003

9000

STEP AName,
address,
and
social
security
number

SSN

Your first name		Initial	Last name	
Spouse's first name		Initial	Last name	
Present home address — number and street, PO Box or rural route				Apt. no.
City, town, or post office				State
				ZIP Code
Your social security number		Spouse's social security number		

IMPORTANT:

Your social security number is required.

STEP BFiling
Status

- Are you a United States citizen? Check "Yes" or "No"** .. **1.** ☐ YES ☐ NO
If you checked "Yes," skip line 2 and go to line 3.
If you checked "No," go to line 2.
- Benefit Eligibility for Noncitizens** .. **2a.** Alien Status Code
If you are not a citizen of the United States, go to page 15.
If you have a qualifying alien status for the United States, enter your alien status code from the chart on page 15 on line 2a. Then enter your alien registration number on line 2b and your date of entry into the United States on line 2c.
2b. Alien Registration Number
2c. Date of Entry
3. Check the appropriate box if you were **one** of the following on December 31, 2002:
A. 62 years or older (See **Note** on page 7, line 3a) .. ☐ **A** ☐
B. Under 62 and blind .. ☐ **B** ☐
C. Under 62 and disabled (not blind) .. ☐ **C** ☐
4. **Enter your date of birth** (example: 0 5 / 2 1 / 1 9 3 8) **4.** Date of Birth
You must enter your date of birth MM DD YYYY
See instructions on page 7 and page 8 to see if you must attach a proof document to your claim. If you cannot check one of the boxes, STOP HERE.
You do not qualify to file for a Homeowner Assistance claim.

STEP CProperty
InformationComplete
line 5
through
line 7.

- Did you own and live in your home on December 31, 2002** **5.** ☐ YES ☐ NO
If "No," stop. You do **not** qualify for homeowner assistance.
a. Enter the FULL value of your property (after subtracting your homeowner's or veteran's exemption). See page 8 **5a.** \$
- Is your property used for rental and/or business as well as personal use?** **6.** ☐ YES ☐ NO
If you checked "Yes," enter the estimated percentage of property devoted to your personal use. See page 9 **6a.** %
- List name(s) and relationship(s) of anyone, other than yourself, who is included on your property tax bill.**
See page 9.
Name _____ Relationship _____ ☐ YES ☐ NO
Name _____ Relationship _____ ☐ YES ☐ NO
Name _____ Relationship _____ ☐ YES ☐ NO
Enter your percentage of ownership **7.** %

Did this person live in your home in 2002?

STEP D

Yearly income of household members

On line 8 through line 13 enter your total household income for the 2002 calendar year. See instructions on page 10 and page 11.

		(Dollars)	(Cents)
8. Social Security and/or Railroad Retirement	8.		
9. Interest, Dividends, and/or Gain (or Loss)	9.		
10. Pensions, Annuities and IRA distributions	10.		
11. SSI/SSP, AB, and ATD (Gold Check). See page 10 (full year total)	11.		
12. Rental and Business Income (or Loss). See page 10 ..	12.		
13. Other Income (including wages). See page 11	13.		
14. SUBTOTAL. Add line 8 through line 13	14.		

STEP E

Adjustments to income

15. Adjustments to Income. See page 11 and page 12	15.		
---	-----	--	--

STEP F

Total household income

16. TOTAL HOUSEHOLD INCOME IN 2002. Subtract line 15 from line 14	16.		
If line 16 is more than \$37,676, stop. You do not qualify.			

STEP G

Property tax paid and homeowner assistance claimed

17. PROPERTY TAX FOR 2002/2003 <input type="radio"/> • 17.		
DO NOT INCLUDE SPECIAL OR DIRECT ASSESSMENTS. Amount on line 17 cannot exceed 1% of the full value of the home. See page 12. You must attach a copy of your 2002/2003 property tax bill.		

You do not have to complete line 18. If you stop here, we will figure the amount of assistance for you.

18. Homeowner assistance claimed (cannot exceed \$472.60). See page 13	18.	
---	-----	--

Reminder

If this is your first year filing a Homeowner Assistance claim and you did not receive SSI, please provide proof of your age, disability, or blindness.

If you filed a claim last year and are under 62 years old, you will need to provide proof of your temporary disability if you did not receive SSI. (This is an annual requirement.)

STEP H

Signature, date, and telephone number

Caution: To avoid delay of your check, be sure to provide all requested information, sign below, and mail to: **FRANCHISE TAX BOARD, PO BOX 942886, SACRAMENTO CA 94286-0904.**

I authorize the Franchise Tax Board to match my name and the information provided herein, as well as information necessary to process my claim, against information gathered from public records, the files of the Department of Health Services, and other state or federal agencies to confirm my eligibility for the Homeowner Assistance Program.

Under penalties of perjury, I declare that this claim and all statements regarding my eligibility and citizenship or alien status, including accompanying schedules and any additional information I may provide to the Franchise Tax Board are to the best of my knowledge, true, correct, and complete.

Sign Here ➡

X _____ Date _____
Claimant's signature

Claimant's Daytime Telephone Number • () _____

Paid Preparer's Use Only

PREPARER'S SIGNATURE ➡	Date	Check if self-employed <input type="checkbox"/>	Preparer's social security number/PTIN
FIRM'S NAME (OR YOURS, IF SELF-EMPLOYED) AND ADDRESS ➡			FEIN/PTIN
		TELEPHONE ()	

Do not write in this space

Do not write in this space

L	D	I	A	R	RES

Worksheet to Figure the Amount of Homeowner Assistance, form FTB 9000

If you want, we will figure the amount of homeowner assistance for you. You may, however, figure this amount by completing line 1 through line 9 for those items that apply to you.

Complete only if the full value of your property as shown on your 2002/2003 property tax bill is more than \$34,000 after subtracting your homeowner's or veteran's exemption.

1. Enter the full value shown on form FTB 9000, line 5a 1. \$ _____
2. Divide \$34,000 by the amount on line 1 above (100% maximum) 2. _____ %

Complete only if your property is used for rental and/or business purposes as well as for your home.

3. Enter the percentage of your home devoted to your personal use shown on form FTB 9000, line 6a 3. _____ %

Complete only if there are owners (other than you and your spouse, or the parents, children, grandchildren [or their spouses] of you or your spouse) listed on your property tax bill who do not live in your home.

4. Enter the percentage of your ownership shown on form FTB 9000, line 7 4. _____ %

Figure the amount of homeowner assistance.

5. Enter the property tax for 2002/2003 shown on form FTB 9000, line 17 5. \$ _____
6. Enter the lowest percentage from line 2, line 3, or line 4 above.
Enter 100% if line 2, line 3, and line 4 are blank 6. x _____ %
7. Multiply the amount on line 5 by the percentage on line 6. Enter this amount or \$340.00 whichever is smaller 7. \$ _____
8. Find your total household income on the schedule below and enter the percentage of assistance here 8. x _____ %
9. Homeowner assistance. Multiply the amount on line 7 by the percentage on line 8. Enter this amount on form FTB 9000, line 18 9. \$ _____

Homeowner Assistance Schedule

If your total household income is		Your percentage of assistance is	If your total household income is		Your percentage of assistance is
From	To		From	To	
\$0	\$9,418	139%	20,724	21,351	59%
9,419	10,046	136%	21,352	21,979	54%
10,047	10,674	133%	21,980	22,606	49%
10,675	11,302	131%	22,607	23,233	45%
11,303	11,931	128%	23,234	23,863	41%
11,932	12,559	125%	23,864	24,490	36%
12,560	13,186	122%	24,491	25,117	32%
13,187	13,814	119%	25,118	25,745	29%
13,815	14,442	116%	25,746	26,373	26%
14,443	15,071	113%	26,374	27,001	23%
15,072	15,698	110%	27,002	27,629	20%
15,699	16,326	106%	27,630	28,257	17%
16,327	16,955	100%	28,258	29,828	15%
16,956	17,583	94%	29,829	31,397	12%
17,584	18,210	88%	31,398	32,968	10%
18,211	18,838	83%	32,969	34,537	9%
18,839	19,466	77%	34,538	36,107	7%
19,467	20,093	71%	36,108	37,676	6%
20,094	20,723	65%	\$37,677	And Over	0%

Example Worksheet to Figure the Amount of Homeowner Assistance

Example for full value over \$34,000.00: Your home was not used as a rental and/or business, your percentage of ownership is 100%, and the full value of your property as shown on form FTB 9000, line 5a is \$70,000. Your property tax after subtracting the homeowners or veterans exemption is \$700. Your total household income is \$13,187.

1. Value of home, from form FTB 9000, line 5a	1.	\$70,000
2. Divide \$34,000 by \$70,000 ($34,000 \div 70,000 = 48.6\%$)	2.	48.6%
3. Personal use of home, from form FTB 9000, line 6a	3.	100%
4. You are the sole owner, see form FTB 9000, line 7	4.	100%
5. Property tax, from form FTB 9000, line 17	5.	\$700
6. Enter smallest percentage of line 2, 3, or 4	6.	48.6%
7. Multiply line 5 by line 6 ($700 \times 48.6\% = 340.20$)	7.	\$340
8. The percentage on \$13,187 of household income is 119%	8.	119%
9. Multiply line 7 by line 8 ($340 \times 119\% = 404.60$)	9.	\$404.60

Note: Line 7 cannot be greater than \$340.00.

The amount from line 9 is your allowable assistance. Enter this amount on form FTB 9000, line 18.

Example for full value less than \$34,000.00: Your home was not used as a rental and/or business, your percentage of ownership is 100%, and the full value of your property as shown on form FTB 9000, line 5a is \$24,000. Your property tax after subtracting the homeowners or veterans exemption is \$240. Your total household income is \$13,187.

1. Value of home, from form FTB 9000, line 5a	1.	\$24,000
2. If the value of your home is less than \$34,000 enter 100%	2.	100%
3. Personal use of home, from form FTB 9000, line 6a	3.	100%
4. You are the sole owner, see form FTB 9000, line 7	4.	100%
5. Property tax, from form FTB 9000, line 17	5.	\$240
6. Enter smallest percentage of line 2, 3, or 4	6.	100%
7. Multiply line 5 by line 6 ($240 \times 100\% = 240$)	7.	\$240
8. The percentage on \$13,187 of household income is 119%	8.	119%
9. Multiply line 7 by line 8 ($240 \times 119\% = 285.60$)	9.	\$285.60

Note: Line 7 cannot be greater than \$340.00.

The amount from line 9 is your allowable assistance. Enter this amount on form FTB 9000, line 18.

Renter Assistance Claim (for income received in 2002) 9000R

STEP A

Name,
address,
and
social
security
number

SSN

Your first name				Initial	Last name				
Spouse's first name				Initial	Last name				
Present home address — number and street, PO Box or rural route						Apt. no.		PMB no.	
City, town, or post office						State		ZIP Code	
Your social security number				Spouse's social security number				IMPORTANT: Your social security number is required.	

STEP B

Filing
Status

- Are you a United States citizen? Check "Yes" or "No" . . . • 1. ☐ YES ☐ NO
If you checked "Yes," skip line 2 and go to line 3.
If you checked "No," go to line 2.
- Benefit Eligibility for Noncitizens** . . . • 2a.
If you are not a citizen of the United States, go to page 15. If you have a qualifying alien status for the United States, enter your alien status code from the chart on page 15 on line 2a. Then enter your alien registration number on line 2b and your date of entry into the United States on line 2c.

• 2a.	Alien Status Code
• 2b.	Alien Registration Number
• 2c.	Date of Entry
- Check the appropriate box if you were **one** of the following on December 31, 2002:

A. 62 years or older (see Note on page 7, line 3a) . . .	<input type="radio"/>	• A	<input type="checkbox"/>
B. Under 62 and blind	<input type="radio"/>	• B	<input type="checkbox"/>
C. Under 62 and disabled (not blind)	<input type="radio"/>	• C	<input type="checkbox"/>
- Enter your date of birth** (example: 0 5 / 2 1 / 1 9 3 8) . . . • 4.
You must enter your date of birth MM DD Y Y Y Y

Date of Birth

See instructions on page 7 and page 8 to see if you must attach a proof document to your claim. If you cannot check one of the boxes, STOP HERE. You do not qualify to file for a Renter Assistance claim.

STEP C

Rental
Information

Complete
line 5
through
line 7.

- Enter the total number of months during 2002 that you lived in a qualified rented residence in California.
See instructions . . . • 5. _____ months
- If the address where you lived during 2002 is different than the address you entered in Step A, or if the address in Step A is a post office box, enter your 2002 residence address. (If more than one rented residence attach a list.)

Street Address	City
State and ZIP Code	
RENTED FROM ____ / ____ / ____ TO ____ / ____ / ____	
- Enter the name, address, and telephone number of your landlord or the person to whom you paid rent during 2002.**

NAME
ADDRESS
CITY
STATE and ZIP CODE
TELEPHONE ()

STEP DYearly Income
of household
membersOn line 8 through line 13 enter your total household income for the 2002 calendar year.
See instructions on page 10 and page 11.

(Dollars)

(Cents)

8. Social Security and/or Railroad Retirement 8.

9. Interest, Dividends, and/or Gain (or Loss) 9.

10. Pensions, Annuities and IRA distributions 10.

11. SSI/SSP, AB, and ATD (Gold Check). See page 10 11.
(full year total)12. Rental and Business Income (or Loss) 12.
See page 10. Do not enter your monthly rent payments.

13. Other Income (including wages). See page 11 13.

14. SUBTOTAL. Add line 8 through line 13 14.

STEP EAdjustments
to income

15. Adjustments to Income. See page 11 and page 12 15.

STEP FTotal household
income

16. TOTAL HOUSEHOLD INCOME IN 2002.

Subtract line 15 from line 14 • 16.

If line 16 is more than \$37,676, stop. You do not qualify.

STEP GRenter
assistance
claimedYou do not have to complete line 17. If you stop here, we will figure the amount of
assistance for you.17. Renter assistance claimed. (Cannot exceed \$347.50)
See page 13 ■ 17.**Reminder**If this is your first year filing a Renter Assistance claim and you did not receive SSI,
please provide proof of your age, disability, or blindness.If you filed a claim last year and are under 62 years old, you will need to provide proof
of your temporary disability if you did not receive SSI. (This is an annual requirement.)**STEP H**Signature,
date, and
telephone
number**Caution:** To avoid delay of your check, be sure to provide all requested information, sign below,
and mail to: **FRANCHISE TAX BOARD, PO BOX 942886, SACRAMENTO CA 94286-0904.**I authorize the Franchise Tax Board to match my name and the information provided herein, as well as information necessary
to process my claim, against information gathered from public records, the files of the Department of Health Services, and
other state or federal agencies to confirm my eligibility for the Renter Assistance Program.Under penalties of perjury, I declare that this claim and all statements regarding my eligibility and citizenship or alien status,
including accompanying schedules and any additional information I may provide to the Franchise Tax Board are to the best of
my knowledge, true, correct, and complete.

Sign Here

X _____ Date _____
Claimant's signature

Claimant's Daytime Telephone Number • () _____

PREPARER'S
SIGNATURE ►

Date

Check if
self-employed ☐

Preparer's social security number/PTIN

FEIN/PTIN

FIRM'S NAME (OR YOURS, IF
SELF-EMPLOYED) AND ADDRESS ►

TELEPHONE () _____

Paid
Preparer's
Use Only

Do not write in this space

Do not write in this space

L	D	I	A	R	RES

Worksheet to Figure the Amount of Renter Assistance, form FTB 9000R

If you want, we will figure the amount of renter assistance for you. You may, however, figure this amount as follows:

If you were a qualified renter for **all of 2002**, your allowable assistance will be based on the total household income (form FTB 9000R, line 16) as shown in the Renter Assistance Schedule below.

If you were a qualified renter for **less than 12 months** during 2002 complete line 1 through line 4 to figure your assistance.

1. Enter the amount of assistance from the Renter Assistance Schedule below for your total household income shown on form FTB 9000R, line 16 1. \$ _____
2. Enter the total number of months during 2002 that you lived in a qualified rented residence in California shown on form FTB 9000R, line 5 2. x _____
3. Multiply the amount on line 1 by the number on line 2 3. \$ _____
4. Divide the answer on line 3 by 12 (months). This is your allowable assistance. Enter this amount on form FTB 9000R, line 17 4. \$ _____

Example for renter less than one year: Total household income is \$13,187 and the residence was rented for 9 months.

1. Amount of assistance from the Renter Assistance Schedule below 1. \$ 297.50
2. Number of months shown on form FTB 9000R, line 5 2. x 9
3. Multiply line 1 by line 2 3. \$2,677.50
4. Divide line 3 by 12 (months). This is your allowable assistance 4. \$ 223.00

Renter Assistance Schedule

If your total household income is		Your renter assistance is	If your total household income is		Your renter assistance is
From	To		From	To	
\$0	\$9,418	\$347.50	20,724	21,351	147.50
9,419	10,046	340.00	21,352	21,979	135.00
10,047	10,674	332.50	21,980	22,606	122.50
10,675	11,302	327.50	22,607	23,233	112.50
11,303	11,931	320.00	23,234	23,863	102.50
11,932	12,559	312.50	23,864	24,490	90.00
12,560	13,186	305.00	24,491	25,117	80.00
13,187	13,814	297.50	25,118	25,745	72.50
13,815	14,442	290.00	25,746	26,373	65.00
14,443	15,071	282.50	26,374	27,001	57.50
15,072	15,698	275.00	27,002	27,629	50.00
15,699	16,326	265.00	27,630	28,257	42.50
16,327	16,955	250.00	28,258	29,828	37.50
16,956	17,583	235.00	29,829	31,397	30.00
17,584	18,210	220.00	31,398	32,968	25.00
18,211	18,838	207.50	32,969	34,537	22.50
18,839	19,466	192.50	34,538	36,107	17.50
19,467	20,093	177.50	36,108	37,676	15.00
20,094	20,723	162.50	\$37,677	And Over	0.00

Toll-Free Phone Service

Our phone service is available 24 hours a day, 7 days a week. You can hear prerecorded answers to many of your questions about Homeowner and Renter Assistance in English and Spanish. For your convenience, please have paper and pencil ready to take notes.

Call:

From within the United States (800) 338-0505

From outside the United States (916) 845-6600
(not toll-free)

Select Homeowner and Renter Assistance, then General Information and enter the three-digit code when instructed. Answers to some of the General Information questions below may be found in your claim booklet.

Code General Information

- 800 What is homeowner assistance and what is the maximum amount a claimant can receive?
- 801 What is renter assistance and what is the maximum amount a claimant can receive?
- 802 Do I need to report my assistance payment as income on my California tax return?
- 803 Who is eligible for homeowner assistance?
- 804 Who is eligible for renter assistance?
- 805 Can I file a claim for both homeowner and renter assistance?
- 806 Will the homeowner assistance create a lien on my house?
- 807 When will I get my assistance check?
- 808 Can I file an assistance claim for past years?
- 809 I'm a patient in a Skilled Nursing or Intermediate Care Facility. Do I qualify for renter assistance?
- 810 How can I prove my age?
- 811 How can I prove my blindness or disability?
- 812 How do I compute my gross household income?
- 816 I need assistance on my property tax bill. Who do I contact?
- 818 When should I file my homeowner or renter assistance claim?
- 819 Who do I contact about low-income housing?
- 821 I lived in a mobile or manufactured home. Which claim form should I file?
- 822 Can I deduct my prior year Net Operating Loss?
- 823 Can I file on behalf of my disabled minor child?
- 824 I lived in a mobile or manufactured home. What documents do I attach to my homeowner assistance claim?
- 825 I lived on tax exempt property. Do I qualify for renter assistance?

Status of Your Assistance Payment

You can find out the status of your assistance payment by calling (800) 338-0505 and selecting Homeowner and Renter Assistance Payment Information. Please allow 15 weeks from the date you mailed your claim for processing to be completed.

Where to Get Claim Forms

By Internet – You can download, view, and print claim forms and publications from our Website at:
www.ftb.ca.gov

By Mail – Write to: TAX FORMS REQUEST UNIT,
FRANCHISE TAX BOARD, PO BOX 307, RANCHO
CORDOVA CA 95741-0307.

By Phone – You can order current year claim forms and publications by calling (800) 338-0505 and selecting Homeowner and Renter Assistance Forms and Publications. Refer to the list below to find the code number for the form or publication you want to order:

Code Homeowner and Renter Assistance Forms and Publications

- 700 FTB 9000/9000R, Homeowner and Renter Assistance Claim Booklet
- 702 FTB 9000 AUD/900R AUD, Homeowner and Renter Assistance Claim Booklet on Audio Cassette
- 704 2002 Property Tax Postponement for Senior Citizens, Blind or Disabled Citizens
- 707 Form FTB 9106, Household Income Schedule
- 708 Form FTB 9225 C-1, Declaration of Citizenship, Alienage, and Immigration Status
- 709 Form FTB 9109, Cooperative Membership
- 710 Form 2194-3, Affidavit of Doctor for Homeowner and Renter Assistance

Where to Mail Your Claim Form

FRANCHISE TAX BOARD
PO BOX 942886
SACRAMENTO CA 94286-0904

Additional Services

Assistance for persons with disabilities

We comply with the Americans with Disabilities Act. Persons with hearing or speech impairments please call:

From TTY/TDD (800) 822-6268

Asistencia Bilingüe en Español

Para obtener servicios en Español y asistencia gratis para completar su declaración de impuestos/formularios, llame al número de teléfono (anotado arriba) que le corresponde.

Usted puede calificar para un reembolso de una parte de los impuestos sobre propiedad que usted pago o alquilo si usted satisface los siguientes requisitos; si en Diciembre 31 de 2002, usted tenía 62 años (o mas) o estaba ciego o incapacitado, y fue dueño o inquilino de la casa donde vivía, y su ingreso por año no fue mas de \$37,676 y es ciudadano de los Estados Unidos o un extranjero designado (incluyendo a extranjeros calificados) como se describe en la pagina 15 de este folleto.

Formularios para solicitar ésta asistencia deben ser entregados del primero de Julio 2003, al 30 de Junio 2004.